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INSTRUCTIONS FOR USE OF RECORDS  
SURVEY WORK SHEET (Form No. 138)

In order to prepare comprehensive Records Control Schedules and to properly analyze and evaluate the results obtained it is essential that a Work Sheet be prepared for each records series as outlined below:

- a. Date Enter the current date of the survey.
- b. Office, Division, Branch, and Section. Enter the organizational elements down to the unit maintaining the files.
- c. Location. Enter building name or number and room number.
- d. Name of File. The title selected for the file series should be descriptive, self-explanatory, and consistent with the terminology of the office using and maintaining the file.
- e. Custodian. Enter name of the custodian or the person who is responsible for the files.
- f. Description. This is the most important factor involved in conducting a records disposition survey. The Area Records Officer should obtain answers to questions such as these: What is the purpose or use of the record? Where does it originate and to what office is it distributed? What is its relationship to other records? What is the frequency of use? Such questions are obviously necessary for a competent appraisal of the records. The importance of accuracy and completeness in this detail cannot be over emphasized if proper values are to be assigned to records.
- g. Filing Arrangement. Record the filing arrangement of the record series. This should be recorded in brief statements such as: "Alphabetically by Surname," "Alphabetically by Subject," "Numerically by Requisition Number," etc.
- h. Inclusive Dates. Enter the date (year only) of the oldest document in the series and the date (year only) of the most recent documents.
- i. Size of Records. Check in appropriate squares the size of the records and enter the linear feet of records in the box provided. Linear feet of records recorded on Survey Sheets should be the actual measurement regardless of the size of the record. Later, when preparing the Records Control Schedule this footage will be converted to cubic feet in accordance with the attached table of standard measurements (See exhibit No. 1).
- j. Equipment Occupied by records. Check in the appropriate square the type of filing equipment housing the records and enter the Approved For Release 2001/08/30 : CIA-RDP74-00005R000100010041-8

k. Remarks. This space is useful for recording ideas, conversations, comments, or other information pertaining to the record series not included elsewhere on the work sheet. Such bits of information often aid materially in the evaluation process or in solving a record problem.

## INVENTORY OF FILING EQUIPMENT

TO RECORDS MANAGEMENT STAFF  
MANAGEMENT STAFF

FROM: (OFFICE, DIVISION)

TYPE OF EQUIPMENT	NO.	TYPE OF EQUIPMENT	NO.
SAFE FILES, LEGAL SIZE	4 DRAWERS 3 DRAWERS 2 DRAWERS	CARD	10 DRS.-DBLE.TRS 12 DRAWERS 15 DRAWERS 18 DRAWERS 20 DRAWERS
SAFE FILES, LETTER SIZE	4 DRAWERS 3 DRAWERS 2 DRAWERS	CABINETS (3 X 5)	
NON SAFE FILE CABINETS, LEGAL SIZE	5 DRAWERS 4 DRAWERS 3 DRAWERS	CONTINUED	
NON SAFE FILE CABINETS, LETTER SIZE	5 DRAWERS 4 DRAWERS 3 DRAWERS 2 DRAWERS	CARD	1 DRAWER 2 DRAWERS 3 DRAWERS 4 DRAWERS 6 DRAWERS 7 DRAWERS
VISIBLE SAFES	10 SLIDES OR MORE 9 SLIDES OR LESS	CABINETS (5 X 8)	
VISIBLE CABINETS	10 SLIDES OR MORE 9 SLIDES OR LESS	CARD	1 DRAWER 2 DRAWERS 4 DRAWERS 6 DRAWERS 8 DRAWERS
MAP - PLAN CABINETS	SECTIONS, 5 DRAWERS	CABINETS (4 X 6)	
SAFE FILES CARD	5 DRS.-3 X 5 OR 5 X 8 8 DRS. - 16 COMP.-TAB.		
CARD CABINETS TABULATING	10 DRS.-20 COMP'TS.		
MICROFILM CABINETS	DRAWERS DRAWERS	MISCELLANEOUS (2 DOOR SAFE, VAULTS, ETC)	
CARD	1 DRAWER 2 DRAWERS 3 DRAWERS 4 DRAWERS 6 DRAWERS 8 DRAWERS 9 DRAWERS		
CABINETS (3 X 5)			

**REMARKS**

SECRET  
(When Filled In)

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RECORDS SURVEY WORK SHEET

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OFFICE, DIVISION, BRANCH, SECTION	LOCATION			
Office of Public Affairs, Service Division	1215 - P			
NAME OF FILE	CUSTOD			
Division Subject File				
DESCRIPTION (Function of files, value, frequency of use, form numbers and titles, and other information, live date.)				
<p>File contains general correspondence, memorandums, reports and other documents concerning personnel, budget, training, work loads, production and, material subjects. These records are accumulated for planning and administrative purposes in carrying out the functions of the Division. Much of the outgoing material originates at the Branch level and is forwarded through the Division to the Office of the Chief for review, signature, and mailing. (Check his files for coverage of Division functions.)</p> <p>The files are referred to frequently during the calendar year but reference declined rapidly thereafter.</p>				
FILING ARRANGEMENT	INCLUSIVE DATES			
Alphabetically by subject		1951-1955		
SIZE OF RECORDS	LEGAL 3" X 5"	LETTER 5" X 8"	OTHER (Specify)	LINEAR FEET 3.5
EQUIPMENT OCCUPIED BY RECORDS	<input checked="" type="checkbox"/> SAFE LEGAL	<input type="checkbox"/> CABINET LETTER	OTHER (Specify)	NO. OF DRAWERS 2
REMARKS	<p>Have checked and found that the activities documented by these files are essentially duplicated in the Office of the Chief. These files needn't be held longer than 2 years in the office. Files should be cut off at the end of each calendar year.</p>			

~~SECRET~~

*(When Filled In)*

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RECORDS SURVEY WORK SHEET

DATE

OFFICE, DIVISION, BRANCH, SECTION

LOCATION

NAME OF FILE

CUSTODIAN

DESCRIPTION (Function of files, value, frequency of use, form numbers and titles, and other descriptive data.)

FILING ARRANGEMENT					INCLUSIVE DATES	
SIZE OF RECORDS	LEGAL	LETTER		OTHER (Specify)	LINEAR FEET	
	3" X 5"	5" X 8"				
EQUIPMENT OCCUPIED BY RECORDS	SAFE	CABINET		OTHER (Specify)	NO. OF DRAWERS	
REMARKS	LEGAL	LETTER				

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